Standard Operating Procedure
13 - Attachment

A.   Purpose

This process documents the steps taken to facilitate attaching any necessary Documents in General Document Type (e.g. Word, Excel, Acrobat, … etc.) or Web Browser Type.

B.   Responsibilities

All Roles can participate in this process. Basically, open any Form (e.g. Site, Building, Project, …, etc.), if the **Attachments** ⇒ **Attachments** from the Pull Down Menu or the **Attachments Button** (the last Button on the Tool Bar) is not grayed out, you should be able to attach any document or web site you want.
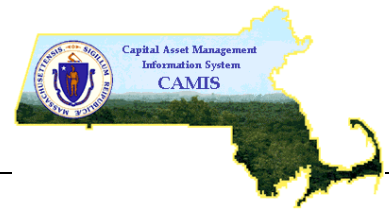
Step 1:

- Open Form, e.g. Service Request, Press the **Execute Query** Button to retrieve a record to attach documents
- Press the **Attachments** Button, you will see the Service Request Attachment Window open with Four Tabs, i.e. **Options**, **Notes**, **Documents** and **Mail** at the top of the Form
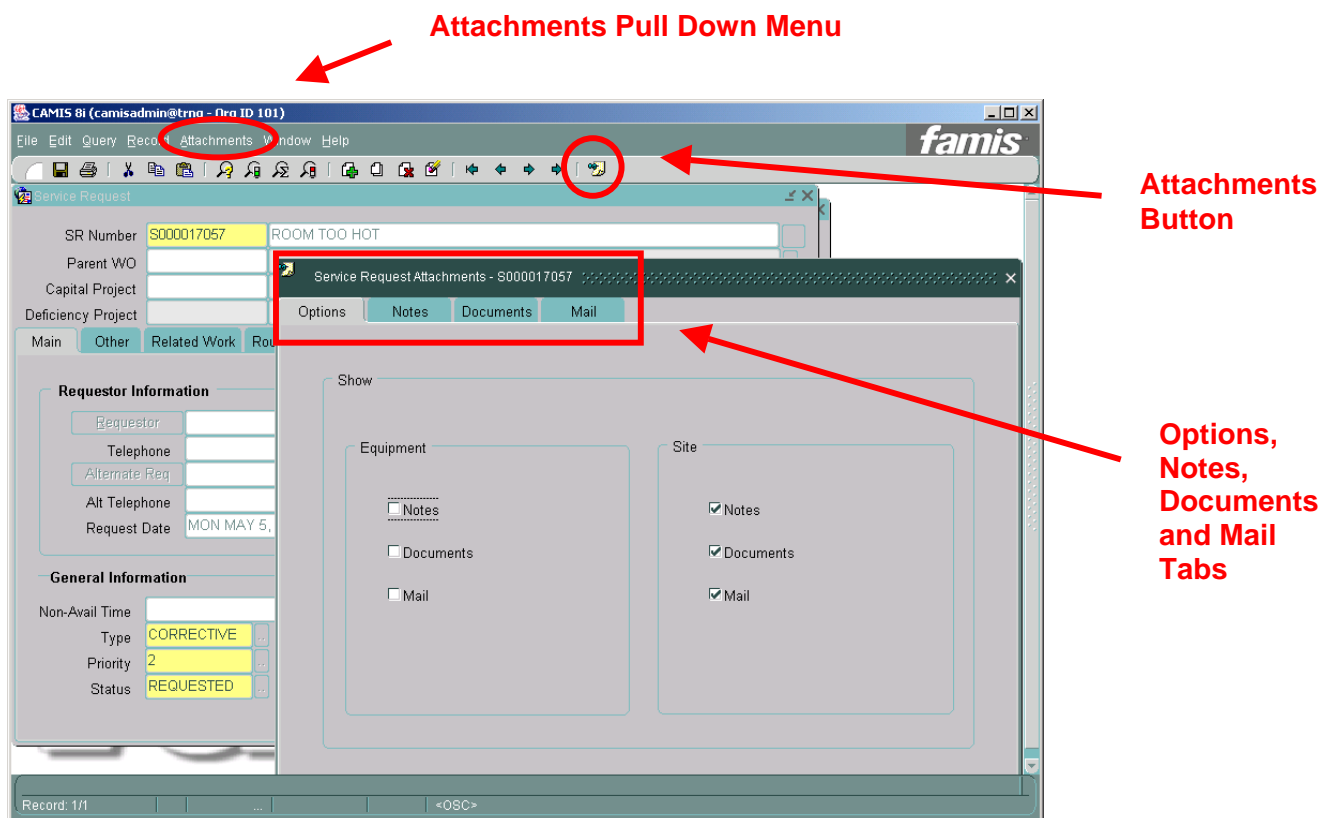
Standard Operating Procedure

13 - Attachment

Step 2:

- Click the **Documents** Tab
- Click the **New** Button
- A **New Document** Window will pop up
- Select **Type** by pressing the Drop Down Menu - You can select either a General Document Type or Web Browser Type for your Attachment
- Type in the **Description**
- If you pick the General Document Type, Click the **Browse…** Button to find your document on your Hard Drive
- If you pick the Web Browser Type, Type in the Web Site **URL Address** (e.g. http://www.yahoo.com) as your Attachment
- Click **OK** Button to Close the Form
- Close the **Service Request Attachments** Window to finish the process